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ABSTRACT

A pilot study addressed the economic issue in vocational education as it relates to the wealth and size of school districts. Examined during the study were nine high schools and nine unit districts that fell into three subgroups based on wealth and enrollment. Data were gathered from public records as well as from school business managers and superintendents regarding wealth, size, numbers of students enrolled, and programs offered. Although the researchers were prepared to treat these data statistically, the districts and programs examined appeared to be so diverse that the designers of the study concluded that a statistical treatment would be inappropriate. Because conscious decisions concerning areas such as the scope of programs and the depth of offerings are the prerogative of local districts, the researchers could not assume that large differences in costs per pupil necessarily represent a difference in the quality of vocational offerings. Therefore, they did not conclude that equity problems exist in the state's vocational education system. They did, however, call for a survey to assess the need for more up-to-date hardware, equipment, and facilities and cautioned that care should be taken to ensure that small, poor districts are not the most burdened by outdated facilities. (MN)

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A PILOT STUDY TO EXPLORE THE EQUITY ISSUES
AND PROBLEMS IN VOCATIONAL EDUCATION IN ILLINOIS

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This study was designed to explore further the equity issues and problems in vocational education. Specifically, the research was designed to address the equity issue as it related to wealth and/or size of district.

Nine high school and nine unit districts were identified as appropriate for the study. Care was taken to select districts so that the districts fell into three subgroups based on both wealth and enrollment. Districts were categorized by high wealth, medium wealth and low wealth, according to Equalized Assessed Valuation Per Pupil (EAVPP) as well as high enrollment, medium enrollment and low enrollment, thus forming nine subgroups. Districts for the exploratory study were carefully selected so as to represent not only the diverse size and wealth of districts but also to address the diversity of vocational programs found throughout the State of Illinois.

Data were gathered regarding wealth, size, numbers of students enrolled, numbers of vocational programs and the respective dollar revenues and expenditures.

Although researchers were prepared to treat the data statistically, districts and programs appeared to be so diverse as to make statistical treatment inappropriate. Rather, it appeared to be more important to report those additional variables that must be considered and clarified prior to making determinations regarding equity in vocational education funding. The original design of the

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INTRODUCTION

Vocational education throughout the nation and in the State of Illinois has been targeted as an educational category appropriate for funding outside the general grant-in-aid system. While earlier patterns distributed funds based on teachers employed, funding for vocational education in the State of Illinois in recent years has been distributed to local districts based on a pupil-driven formula. Local districts requested funds by filing a Local Plan for Vocational Education. This plan delineated those sequences of courses upon which claims would be based. The funding formula incorporated a local district ability to pay factor, weightings for new programs, special organizations and handicapped and disadvantaged students. Priorities were historically assigned to courses which reflect current job market needs. Claims were filed based on numbers of pupils enrolled in courses. This is the funding pattern that was in place for the time period involved in this study and until FY 83.

In summary, combined state and federal dollars were distributed to districts utilizing a formula which addressed in part the equity issue for students while retaining as the thrust of vocational education the preparation of students for entry into the work force.

OBJECTIVES OF THE EXPLORATORY STUDY

This study was designed to explore further the equity issues and problems in vocational education. Specifically, the research was designed to address the equity issue as it related to wealth and/or size of district.

The study sought to identify those local district revenues which support vocational education including area vocational schools as well as joint

agreements. The study further sought to identify both state and federal contributions to vocational programs beyond formula funding. Expenditures were originally intended to be related to both wealth and size, the hypothesis being that small, poor districts offer lower levels of vocational services while larger, richer districts offer higher levels of goods and services.

SELECTION OF DISTRICTS BY WEALTH AND SIZE

Districts for the exploratory study were carefully selected so as to represent not only the diverse size and wealth of districts but also to address the diversity of vocational programs found throughout the State of Illinois. Vocational programs have traditionally reflected community values and interests. While many districts offer comprehensive programs categorized as elementary, personal and public service, applied biological and agricultural, business, marketing and management and industrial oriented, others intentionally limit the number of programs available to students enrolled in the district. Thus, districts were selected to demonstrate the variances in programs and funding between large and small, rich and poor districts.

Nine high school and nine unit districts were identified as appropriate for the study. Care was taken to select districts so that the districts fell into three subgroups based on both wealth and enrollment. Districts were categorized by high wealth, medium wealth and low wealth, according to Equalized Assessed Valuation Per Pupil (EAVPP) as well as high enrollment, medium enrollment and low enrollment, thus forming nine subgroups.

Unit districts that were said to be high wealth (HW) districts had an equalized assessed valuation per pupil of at least \$42,535; medium wealth (MW), \$29,388 - \$42,534; low wealth (LW), less than \$29,388. Unit districts

classified as high enrollment (HE) districts had in excess of 1300 students; medium enrollment (ME), 600 - 1299 students; low enrollment (LE), fewer than 600 students.

High school districts that were said to be high wealth (HW) districts had an equalized assessed valuation per pupil of at least \$123,082; medium wealth (MW), \$81,520 - 123,081; low wealth (LW), less than \$81,520. High school districts classified as high enrollment (HE) districts had in excess of 1500 students; medium enrollment (ME), 592 - 1499; low enrollment (LE), less than 592.

SOURCES OF DATA

Data gathered were formulated into Tables 1-4 (see Appendix A). The following terms and definitions were utilized in categorizing and displaying the data.

Total district and high school enrollments were obtained from Annual State Aid Claim Statistics (1981-82) Illinois Public Schools (Best 6 months ADA 80-81 and Best 6 months 9-12 ADA 80-81). Vocational enrollment was obtained from Vocational Education Data System (VEDS) report. Figures are self-reported by school district officials in this annual report.

Revenue figures for districts included in the pilot study were obtained from Illinois State Board of Education, Financial Statistics for the 1980-81 School Year (9/26/82). It was possible to obtain representative figures for those revenues obtained from local sources by utilizing the category "Local Taxes." "Common School Fund" provided the general state aid revenue figure utilized in the study. A decision was made to group Other State Funds, Federal Funds, Student and Community Services and All Other Revenue into one category called "Other" for display purposes in Table 1; this figure excluded

that dollar reimbursement obtained by the pilot districts for vocational education programs provided in their schools to their students. Vocational reimbursement revenues were obtained from the Illinois State Board of Education, Illinois Office of Education, Adult, Vocational, and Technical Education, Fiscal Year 1981 Reimbursement Summary, Part A—Statewide Reimbursement. Vocational reimbursement was reported in Tables 1 and 2 as a dollar amount and as a percentage of the total revenue. Total Revenues was the sum of local, state, other and Adult, Vocational and Technical Education (AVTE) revenues.

Data in regard to student enrollment and expenditures of formula-reimbursed vocational programs were obtained from the Vocational Education Data System (VEDS) Report for 1980-81 and are presented in Tables 3 and 4. The VEDS report is required to be completed by officials in each school district claiming reimbursement and requires declarations of students enrolled by vocational program (Agricultural Occupations, Distributive Occupations, Health Occupations, Occupational Homemaking, Home Economics Occupations, Office Occupations, Technical Occupations, Industrial Occupations, Other Programs) as well as a breakdown of vocational instruction and total vocational education expenditures. VEDS reports completed by each of the schools included in the pilot study were examined and were the source of data gathered.

Total district operating expenditures for the purposes of this study were those operating expenses, Regular K-12, obtained from Region Summary of District Type of Local School District Expenses 1980-81 prepared by the Finance Section, Illinois State Board of Education.

PROCEDURES

Business managers and superintendents were interviewed prior to the collection of data in an effort to identify the most reliable sources that would generate standard responses on the collection instrument. Once the sources from which the data could be obtained had been finalized, further discussions took place regarding the data being used and the constraints that should be considered in utilizing it. Interviews yielded differing responses and interpretations; it was apparent that use of the new chart of accounts would permit increasingly standardized responses. In terms of the categorizing of data reported for the year 80-81, procedures varied greatly from school to school. Even the simplest question related to personnel costs led to half-hour discussions in an effort to delineate "vocational" personnel. Most high school data were organized by department and did not break out within departments a vocational component. This created a major problem in easily working with districts to identify expenses associated with "reimbursed programs." The researchers had realized the complexities of vocational education funding, but as interviews were conducted the simplicity with which the initial proposal for this study was developed seemed inappropriate.

The data presented in Tables 1-4 provide only limited information regarding vocational programs. Although researchers were prepared to treat the data statistically, districts and programs appeared to be so diverse as to make statistical treatment inappropriate. Rather, it appeared to be more important to report those additional variables that must be considered and clarified prior to making determinations regarding equity in vocational education funding.

DISSIMILAR GOALS

First, it is essential for readers to understand that vocational education programs in the many school districts in the State of Illinois have been permitted to take diverse directions. Districts exercise local control and may or may not apply for funding through writing, during the FY 80-81 year, a one- and five-year plan (currently known as a Local Plan for Vocational Education) and eventually claiming reimbursement. Reimbursement in the recent past has been based on a formula driven by student enrollment and priorities assigned. These priorities were assigned based on the degree of difficulty of providing instruction and the job market need. Priority weightings were assigned to provide additional resources for start-up costs, disadvantaged and handicapped and limited English proficiency students along with the application of the ability-to-pay factor assigned to the local district. The priorities assigned various courses for funding were subject to annual change based on fluctuating cost factors and changing demands of the job market.

It has been a matter of choice for each individual district in filing a local plan for vocational education. Each district applying has been required to identify sequences of courses in its plan. The intent of this funding process was to provide incentives for districts to provide stronger vocational programming through the establishment of course sequences within program areas. A sequence of courses constituted a program designed to provide students with job entry skills through the progressive enrollment in these courses. Once the sequence of courses was approved, students were reimbursed based on individual enrollment in classes. As an example, a student could be enrolled in a typing class, a food management class and an electricity class and the district could receive reimbursement for all three courses if these courses

were parts of either the same or separate sequences.

Understanding of this basic premise of support and incentive is important for it was this particular system which was in place for FY 80-81, the time period for which the data for this study were gathered. This process compensated directly students for those credits in which they were enrolled; however, what is often forgotten in computing the costs of a local program is the fact that numbers of courses were not parts of approved sequences. For example, Personal Typing, Business Mathematics and Business English were not reimbursible courses in most business sequences. As a result, one could not, in calculating vocational personnel costs, simply total salaries of all business faculty. Business managers and superintendents contacted indicated that they would have to calculate the percentage of the day in which the teacher was involved in the teaching of reimbursible courses. The reality of this situation for many districts is that the amount of funding generated (see percent of AVTE reimbursement in Tables 1 and 2) is not a primary consideration in the determination of programs offered in a school building or district. Business managers and superintendents indicated that community values, numbers of college-bound vs. employment-bound students, existing facilities and equipment and availability of staff determine vocational programs in schools today. Certainly when funding assistance was within reach, districts have historically made the necessary effort to secure additional resources.

CHANGES IN REIMBURSEMENT

It is also important to understand that a basic change has taken place in the funding formula being applied at the time of this report. In the above example, a student's enrollment in all three courses might receive

funding, whereas students are currently (as of FY 82-83) being declared in one vocational program and funded only for the courses in that program. If the student was classified as an industrial student, he could be reimbursed for his enrollment in the electricity class only (not the typing or the foods management classes). Since this new pattern of funding is in its initial year of implementation, the effects on schools or programs is still a question mark. What can be seen and is sensed by districts is an increased focus on an entry-level preparation for work. Superintendents and business managers indicated a certain ambivalence regarding funding changes indicating that they would reserve judgment but also indicating that they were not anticipating dramatic changes in programs to attempt to respond to the new funding pattern.

It became apparent in interviews that for the year being studied it would be possible to cost out that percentage of faculty time devoted to vocational programs; however, it was also apparent that there was little interest on the parts of administrators interviewed in performing the detailed and laborious calculations to break down precisely those personnel costs both in terms of students enrolled and faculty employed.

STUDENT ENROLLMENT/CLAIM DATA

Total student vocational enrollment figures displayed in Tables 1-4 and the breakdowns by program area have been gathered from Vocational Education Data System (VEDS) reports. These figures are those which were self-reported by school district officials and provide the most accurate breakdown of students by program area. These data, however, did not provide information as to the extent of involvement of the student in the program area. Whether the student was enrolled in one, two, or three courses in the program area was an

unknown. Also a forced choice has been made in placing the student in an occupational area. Duplications have only been permitted in the Occupation of Homemaking and Other areas; thus, those studying the tables will occasionally observe totals where vocational students exceed total students. If a student was enrolled in one business course and one industrial course, a choice was made as to the declaration of the student as a business or as an industrial student. One can imagine the difficulties this presents annually for that district official making the decision. Usually the student's course enrollment history is studied to determine a pattern, if any, of enrollment. Conversations with business administrators and superintendents indicated some variance in interpretation and procedures. The accuracy of the VEDS data is directly related to the care with which it has been gathered by local districts.

The accuracy of costs by student could only be precisely determined under the "old" system by going to those claim reports provided to districts and relating the number of students funded to that percentage of a teacher's time that would be occupied. Under the "new" system, that proration would be even more difficult. Two students might sit side-by-side in a classroom and receive instruction in the same manner from the same teacher. Because of classification, one of these two students might be funded while the other would not receive funding.

DIVERSITY OF PROGRAMS

Vocational enrollments by program as seen in Tables 3 and 4 display further complications and problems in conducting research in vocational education funding. Large or small, wealthy or poor, districts provide diverse and unique programs for students. No mandate requires specific vocational

courses or programs to be offered by schools or to be pursued by students. One can see at a glance in viewing Tables 3 and 4 that all pilot districts do provide some reimbursed vocational education. However, community values and the tradition of vocational education accompanied by the historical pattern of education in a community influence greatly the types of programs and depth of sequences existing within programs. Some districts limit the number of vocational programs but strive to provide entry-level skill training to students. Other districts believe that broad exposure to occupations and an introduction to vocational education during the high school years is appropriate for their youth. They, therefore, maintain vocational offerings that are fairly comprehensive but limited in depth. Similar amounts of reimbursements and similar numbers of students could and do represent very different programs and degrees of commitment to vocational education in any one district.

Certain of the districts were found to participate in joint agreements or were administrative districts for area vocational centers. Area center funds have not been displayed in any of the tables. Participation in an area center usually implies that some number of junior or senior students are being served in upper-level or advanced vocational courses at a central location and that the local district does not have a self-contained program. Thus another complexity appears. Area vocational centers have one administrative center. Students from the participating districts are claimed by the area center; Tables 1 and 2 do not reflect numbers of students involved in area center classes. Area center reimbursement for administrative center has been included as a part of other revenues for purposes of this pilot study. Area center and joint agreement expenses and revenue would necessarily have to be included in any thorough study of equity issues. Annual tuition as well as

any other shared financial burdens would need to be documented.

COMMITMENT OF DISTRICT PERSONNEL

Although the previously identified problems would require time and attention, it is clear that a researcher could formulate questions and collect data with the direct assistance of superintendents, business managers and appropriate vocational personnel involved in budget formulation and execution in a district. It is doubtful, however, that many of the above-mentioned persons would be willing to devote the necessary time to gather this information.

It is important to reinforce again, at this point, that Table 1 (percent reimbursement) displays the vocational formula reimbursement as a percent of the total district revenues. This amount is minute in comparison to total revenues and expenses of districts, thus having little influence or providing small incentive to radically change vocational programs. It must be remembered that high schools have been structured to accommodate departmentalized and comprehensive offerings. The existing facilities, availability of staff, and the tradition of vocational program areas in a particular community commit districts to continuing, expanding, or reducing programs. The potential of additional state and federal funds has limited impact on a district's decision to add a vocational program to its total vocational program.

FACILITIES AND EQUIPMENT

Those interviewed and numerous reports found in the literature today indicate that one of the most pressing problems in vocational education

funding today exists in updating facilities and equipment. Growth in vocational education programs has been effected in order to provide students with entry-level training, thus preparing persons for the world of work and placing persons in the work force. It has been argued well and convincingly over time that training sites (schools) must provide laboratories which reflect "current business and industry conditions." During previous decades in the recent past, growth in numbers of school-age children has encouraged building programs. The combination of rapidly developing technology and necessary expansion of facilities has assisted school districts in updating or creating new laboratory settings.

In the 1980s a new dilemma has been presented. Not only do the great majority of school districts contend with the decline in numbers of pupils enrolled and the resulting fewer dollars generated, but these districts must deal with massive and rapid strides in technological developments. Decisions as to rehabilitation of facilities, equipment to be purchased, buildings to be closed and sophisticated areas of technology beyond the scope of high schools are topics of discussions throughout the United States. The problems involved in determining cost factors in regard to facilities are numerous. These problems become particularly troublesome when one seeks to consider them in an equity context. Some of the questions which must be considered pertaining to vocational facilities are:

1. What facilities exist in the district?
2. What is the age of available facilities?
3. What effort was put forth to provide such facilities? By whom?
4. Are existing facilities supplemented by joint agreement or area vocational center facilities?

5. How many dollars are expended annually to support/maintain/rehabilitate facilities?
6. How many dollars are spent over a period of time (such as five years) to support/maintain/rehabilitate facilities?
7. What formula should be used to calculate cost per student?
8. If one were to relate facility costs to student use, should some system of weighting be used to demonstrate the diverse costs of instruction for students at various levels of training?

The above questions relate only to vocational facilities and classrooms; however, one would have to prorate the costs of facilities which were not purely vocational but were used by vocational students. The consideration of libraries and lunchrooms raises numerous questions in designing a system by which the costs of facilities can be prorated.

SUMMARY

This study has attempted to identify some of the equity issues and problems in vocational education. The original design of the study was changed to permit discussion of problems rather than statistical treatment of data and involved an overview of funding processes for FY 80-81 and the new funding pattern for FY 82-83. This in itself represents a change which may make any detailed analysis of what "was" inappropriate. This is not to say that any comparison of the past with the present would not be appropriate.

Changes have taken place in the manner of funding which may make the prorating of instructional costs even more difficult than it has been in the past; furthermore, there appears to be little interest on the parts of school district officials in participating in this process. The true difficulty in conducting vocational education research and making such comparisons emerges

in the painstaking care that would need to occur on the parts of researchers. The time-consuming assistance on the parts of district officials that would be essential to gather comparable data from districts would certainly be difficult to obtain and would involve local district personnel in making fine distinctions in which they often are not interested. Districts view their vocational programs and personnel in a broader sense than does the researcher attempting to relate reimbursement monies from state and federal sources to local district revenues.

Districts by intent pursue dissimilar goals and as a result establish diverse programs requiring very different resources and levels of commitment from the respective districts. The unique nature of programs in the several district types in Illinois have evolved from philosophical positions emerging out of regional differences and the historical patterns of schooling in districts. Conscious decisions as to scope of programs, depth of offerings, participations in area centers or joint agreements are made and are the prerogative of the district. It therefore becomes essential that these differences be considered when categorizing programs prior to subjecting data to any statistical treatment.

A final concern that may be the most serious and the most difficult to assess is related to the costs of vocational facilities and equipment. These costs become particularly troublesome when one attempts to consider them in an equity context.

RECOMMENDATIONS

On the basis of this pilot study, the following two recommendations are made:

A. The authors found that assumptions underlying "equity" studies in general K-12 education do not fit very well in vocational education. One can not assume that large differences in costs per pupil necessarily represent a difference in the quality of vocational offerings since the cost differential could very well be the result of a difference in type of vocational offering. The authors did not, therefore, conclude that equity problems exist in vocational education; they would recommend, however, that equity probes concentrate upon the kinds of services offered rather than the costs of these services.

B. Many local business managers talked about problems in acquiring up-to-date hardware, equipment and facilities in general; it appears that a major problem exists in this aspect of vocational education. The problem is so wide spread and chronic that it is recommended that the Illinois State Board of Education, with the assistance of business and industrial advisors, undertake a survey of equipment and facilities to determine the severity of this problem and to determine the extent to which the unemployment problem is related to it. Also, as this survey progresses, one should be alert to possible equity problems, since there is a strong possibility that small, poor districts may be most burdened by outdated equipment/facilities.

SOURCES

Annual State Aid Claim Statistics (1981-82), Illinois Public Schools, Illinois State Board of Education.

Financial Statistics for the 1980-81 School Year (9/26/82), Illinois Public Schools, Illinois State Board of Education.

Fiscal Year 1981 Reimbursement Summary, Illinois State Board of Education, Illinois Office of Education, Adult, Vocational and Technical Education.

Region Summary of District Type of Local District Expenses, 1980-81, Finance Section, Illinois State Board of Education

Vocational Education Data System (VEDS) Report forms filed with the Illinois State Board of Education, Adult, Vocational, Technical Education.

APPENDIX A

TABLE 1
UNIT DISTRICT REVENUES

Districts by Wealth/ Enrollment	District Enrollment			School District Revenues					
	K-12	9-12	Voca- tional	% AVTE	\$ Reim- bursement	Local Taxes	Common School Fund	Other	Total Revenues
HW/HE	5,079	1,616	916	.1248	25,131	15,481,264	1,237,003	3,400,118	20,143,516
HW/ME	678	185	164	.2437	5,147	1,721,245	118,190	267,385	2,111,967
HW/LE	258	101	184	.2154	2,839	757,659	178,680	378,621	1,317,869
MW/HE	3,271	1,172	873	.6852	51,426	4,742,514	1,830,037	880,601	7,504,628
MW/ME	870	237	209	.5144	12,128	1,210,756	512,775	621,862	2,357,521
MW/LE	479	201	242	.6284	7,972	642,198	363,056	255,193	1,268,419
LW/HE	14,258	4,664	3,008	.5087	168,490	12,536,006	13,416,568	6,999,159	33,120,223
LW/ME	929	306	289	.6222	12,914	881,261	754,389	426,682	2,075,246
LW/LE	384	113	69	.2537	2,168	241,292	425,314	135,612	854,386

TABLE 2
HIGH SCHOOL DISTRICT REVENUES

Districts by Wealth/ Enrollment	District Enrollment		School District Revenues					
	9-12	Voca- tional	% AVTE	\$ Reim- bursement	Local Taxes	Common School Fund	Other	Total Revenues
HW/HE	5,104	4,030	1.6121	360,656	14,731,438	2,996,282	4,284,006	22,372,382
HW/ME	1,068	810	.7766	28,645	2,288,695	679,386	691,956	3,688,682
HW/LE	339	482	.6786	7,377	833,313	113,289	133,142	1,087,121
MW/HE	2,586	2,190	.7564	64,682	5,142,993	2,005,443	1,338,666	8,551,784
MW/ME	691	557	.4252	11,339	1,091,993	510,402	1,076,384	2,690,218
MW/LE	191	135	.3193	2,918	468,932	148,589	617,521	913,781
LW/HE	1,640	1,147	.6969	36,149	2,564,250	1,801,064	785,561	5,187,424
LW/ME	1,343	1,391	1.4363	56,832	1,613,449	1,656,159	630,272	3,956,712
LW/LE	470	48		20,416	701,299	855,890	590,577	2,168,182

TABLE 4

HIGH SCHOOL ENROLLMENTS BY VOCATIONAL PROGRAMS AND EXPENDITURES

Districts by Wealth/ Enrollment	District Enrollment		Vocational Enrollments by Program								Expenditures		
	9-12	Voca- tional	Ag.	Dist Occ.	Health	Occ. Home	Home Econ	Of- fice	Indus- trial	Other	Vocational Instruction Only	Total Vocational	Total District Operating
HW/HE	5104	4030	309	196	145	137	234	112	1660	237	1,548,381	3,150,991	17,996,790
HW/ME	1068	810	77	10	4	60	142	342	142	33	318,343	331,263	2,848,565
HW/LE	339	482	68	0	0	79	48	169	101	17	103,900	129,900	951,843
MW/HE	2586	2190	71	63	0	468	350	681	547	10	1,540,319	1,681,964	6,003,280
MW/ME	691	657	7	0	0	147	59	241	191	12	139,235	263,435	2,078,071
MW/LE	191	135	36	0	0	7	15	36	41	0	104,572	111,136	597,901
LW/HE	1640	1147	8	7	0	0	163	458	519	0	373,811	496,719	3,772,455
LW/ME	1343	1391	111	36	192	33	83	331	562	43	539,449	1,002,040	3,264,136
LW/LE	470	439	24			88	12	53	162		189,422	279,147	1,760,257